



Sample Performance Review

Personal Data		
Employee ID 99999	Employee Name Sally Employee	Job Title Staff Assistant
Division/Section Division A	Reviewer Joe Supervisor	Review Period 07/1/03 -- 06/30/04
Performance Goals and / or Job Responsibilities (Elements)	Results and Accomplishments	Ratings
A performance goal is a statement of results to be achieved in a given review period. Goals are project or target-based. A job responsibility (element) is a requirement that must be met on an ongoing basis. Job responsibilities define routine tasks or essential functions.	Evaluate results against mutually established performance goals and job responsibilities.	Select one rating for each performance goal or job responsibility (element).
1. Serve for one year on the Training Advisory Committee and identify division training needs by conducting and documenting interviews with division supervisors and employees.	Sally completed a one-year term on the Training Advisory Committee. She interviewed all department heads, all administrative assistants and five people in each department regarding training needs. She documented requested courses and presented needs to the committee.	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations
2. For six months provide mentorship for John Doe through the new employee buddy program. Spend approximately two hours per week during the first month of John's employment completing all tasks on the buddy checklist. During the next five months, answer questions and train as needed.	Sally served as a mentor for John Doe. She not only completed all the tasks on the buddy checklist, but she worked to enhance the buddy program and recruit and train other buddies. She helped John successfully complete his probationary period. He quickly became comfortable in our work environment, demonstrated little frustration and was contributing to the department within a short period of time.	<input type="checkbox"/> Outstanding <input checked="" type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations
3. Assume the responsibilities of division records coordinator. Work with the Lab's Records Manager to learn all policies and requirements. Develop division work processes and procedures and train division support staff. Since Sally did not successfully meet this goal, it will carry over to next year. The new goal may be worded: Work with the Lab's Records Manager to learn how to develop departmental work processes and procedures for records management. Meet with other records coordinators to study their systems. Use project management software to document and plan this project.	Sally assumed the duties of division records coordinator and learned all of the lab policies and requirements. However, she struggled with developing departmental work processes and was not able to successfully train support staff in using them	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input checked="" type="checkbox"/> Does not meet expectations

4. Research the existing laboratory financial systems for tracking costs and expenditures to determine how they can help the division track expenditures more efficiently. Develop an implementation and training plan for the division and present the plan to division and department heads.	Sally researched the existing laboratory financial systems for tracking costs and expenditures. She presented an implementation and training plan to division and department heads. Her suggestions will be implemented next year with few changes.	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations
5.		<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations
6.		<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations
7.		<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations
8.		<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations
9.		<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations

Core Competencies		Competency Ratings
Select one rating for each competency		
Initiative and Creativity	<input type="checkbox"/> Outstanding <input checked="" type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Judgment	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Cooperation/Teamwork	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Quality of Work	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Reliability	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Commitment to Safety	<input type="checkbox"/> Outstanding <input checked="" type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Support of Diversity	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Job-specific Competencies (Optional)*		
	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Managerial/Supervisory Competencies (For employees who supervise others)		
Leadership	<input type="checkbox"/> Outstanding <input checked="" type="checkbox"/> Excellent <input type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Decision Making	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Resource Management	<input type="checkbox"/> Outstanding <input type="checkbox"/> Excellent <input checked="" type="checkbox"/> Commendable <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations	
Summary of Performance and Review of Competencies		
<p>Sally is a very cooperative employee. She often organizes team-building activities and was integral in implementing cross-training into our department's buddy system. Now employees can cover for one another in the event of an extended absence. Sally also completes her work accurately. It is rare to find a mistake in her work.</p> <p>Sally serves as a floor safety warden. She also serves as a member of the division's ES&H committee. She has made several solid suggestions for ways to improve safety in our division.</p> <p>Sally recently participated in a job-fair at a predominately hispanic university. She supports diversity at the laboratory and provides a work environment that is respectful of others.</p> <p>Performance Improvement Need '04: Last year Sally and I discussed the need for her to improve her skills using FileMaker Pro. Sally completed a FileMaker training course and was able to apply what she learned to document training and create a variety of reports.</p>		

Career Development Plan (Optional)

Sally will attend the Lab's orientation for supervisors course so that she can serve as the division buddy coordinator and orientation liaison. She will also take an HTML training course so she can develop department-specific orientation web pages.

Sally will expand her knowledge and skill in mentoring by doing additional reading and research.

Signatures

Employee Acknowledgement of Performance Goals/Job Responsibilities and Competencies

My supervisor/manager and I identified and discussed my performance goals, job responsibilities and job-related competencies at the beginning of the review period.

Employee Signature _____ Date _____

Progress Review (Optional)

My supervisor/manager and I discussed my performance. We have updated goals/job responsibilities and competencies (if needed).

Employee Signature _____ Date _____

Overall Rating

Employee ID: 99999

Employee Name: Sally Employee

Select only one rating

<input type="checkbox"/> Does not meet expectations	<input type="checkbox"/> Meets expectations +	<input checked="" type="checkbox"/> Commendable +	<input type="checkbox"/> Excellent +	<input type="checkbox"/> Outstanding +
<input type="checkbox"/> Meets expectations -	<input type="checkbox"/> Commendable -	<input type="checkbox"/> Excellent -	<input type="checkbox"/> Outstanding -	
<input type="checkbox"/> Meets expectations	<input type="checkbox"/> Commendable	<input type="checkbox"/> Excellent	<input type="checkbox"/> Outstanding	

Second-level Managerial Approval of Performance Review Document

I have reviewed and approved the performance review document and overall rating.

Signature _____ Date _____
(Manager of reviewer)

Reviewer Acknowledgement of Performance Review Document

I have discussed the performance review document with the employee and advised the employee of his/her overall rating.

Reviewer Signature _____ Date _____
(Person who prepared the review)

Employee Acknowledgement of Performance Review Discussion

My supervisor/manager has reviewed and discussed the performance review document with me. My signature means that I have been advised of my performance status and does not necessarily imply that I agree with it.

Employee Signature _____ Date _____

Employee Comments (Optional)

Mentor Comments (Optional)